

Memorandum for General RFP Configuration

To: General RFP Vendors Authorized to sell ESRI products

From: David L. Litchlitter

CC: Keith Kite, ESRI

Date: January 31, 2005

Project Number: 34983

Contact Name: Jane Woosley

Contact Phone Number: 601-359-2081

Contact E-mail Address: jane.woosley@its.state.ms.us

Re: Process for Applying to sell under the State of Mississippi – ESRI Master Pricing Agreement

The purpose of this Letter of Configuration is to describe the process for qualified vendors to sell products under the Master Purchase Agreement between the State of Mississippi and Environmental Systems Research Institute, Inc. (ESRI).

The Mississippi Department of Information Technology Services (ITS), as contracting agent for the Agencies and Institutions of Mississippi, and Environmental Systems Research Institute, Inc. (ESRI) executed a Master Purchase Agreement (MPA) effective December 15, 2004, ESRI Contract Number 2003MPA6052. This agreement provides for certain discounts on ESRI software that will be available for all Mississippi governmental and educational entities' purchases. This MPA will be classified as an Express Products List (EPL) on the ITS Website, and ITS Customers may use this MPA by complying with the associated EPL Instructions for Use.

The MPA provides that Mississippi customers may purchase ESRI Software either directly from ESRI or from an authorized ESRI reseller, provided certain requirements made by both ESRI and ITS are satisfied.

- **ESRI Requirements**

- The ESRI reseller must be a member of the ESRI Business Partner Program in good standing at the time the order is placed with ESRI and be authorized to

provide the Software ordered as defined at ESRI web site
<http://gis.esri.com/partners/index.html>.

- The customer purchase order forwarded by the reseller to ESRI must be completed correctly and must include the reseller name and the Software MPA pricing. If the reseller does not use the MPA pricing, then the reseller cannot participate under this MPA.

- **ITS Requirements**

- The ESRI reseller must submit a letter of authorization from the ESRI Mississippi Account Manager listed on page three (3) that documents they are an authorized ESRI Business Partner.
- The ESRI reseller must have and maintain an approved response to the current ITS General Request for Proposal (RFP) for Hardware/Software that runs in a Windows, Apple or open systems Unix environment. For information on how to respond to this RFP, go to the ITS Website, http://www.its.state.ms.us/vendor/genref_rfps.htm or call the ITS Procurement Help Desk, 601-576-HELP (4357).
- ITS is interested in ESRI resellers who have Value Added capabilities with resources physically proximate to Mississippi customers. Interested ESRI resellers must respond to the Vendor Profile attached to this Memorandum and send it to the ITS contact listed on page three (3) once the two requirements above are satisfied.

Once approved by both ESRI and ITS, the ESRI reseller's contact information will be added to the ESRI EPL Instructions for Use and customers may choose to process their orders through that reseller or directly through ESRI. If all conditions of sale under the MPA are met, ESRI will accept the order and the authorized reseller will receive a sales commission. ESRI will deliver the ESRI Software directly to Customer (Licensee), invoice, and receive payment for any such order.

Responses received from valid General RFP ESRI resellers to this Letter of Configuration and the subsequent certification of qualified resellers by ITS and ESRI will be an ongoing process throughout the life-cycle of contract number 2003MPA6052. ITS and ESRI will update the list of resellers as they become certified. This Memorandum is being sent to those vendors approved under the current ITS General RFP 3361 for LAN-based hardware and software to run in a Windows, Apple, or Open Systems UNIX environment. However, vendors approved under future cycles of this General RFP for LAN-based hardware and software to run in a Windows, Apple, or Open Systems UNIX environment may use these same instructions for apply to participate under the ESRI Agreement.

Please direct all inquiries and correspondence to the following ITS and ESRI representatives.

ESRI Keith Kite ESRI - San Antonio Tel: 210-499-1044 ext. 8828 Mobile: 210-240-6473 Fax: 210-499-4112 kkite@esri.com	ITS Jane Woosley, EPL Team Leader 301 N. Lamar Street, Suite 508 Jackson, MS 39201 Tel: 601-359-2081 Fax: 601-354-6016 jane.woosley@its.state.ms.us
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Enclosure

- Vendor Profile Requirements for ESRI – Mississippi MPA

VENDOR PROFILE

This Vendor Profile solicits specific information about the ESRI Reseller ("Vendor"). **ITS** reserves the right to use this information in determining a Vendor's qualifications and ability to serve the state, and to share such Vendor information not labeled below as Confidential with our users as they request it.

Vendor should answer these questions in relation to how Vendor can serve **ITS'** Mississippi government and education clients. **ITS** is not interested in volumes of annual reports or marketing brochures that generalize Vendor national services. We want to know, in detail, how Vendor proposes to service Mississippi clients.

Directions: Vendor must respond to all of the following questions. Please be to the point and thoroughly answer all questions.

1. **History**

- 1.1 Please provide background details on the company including year started, business structure, ownership information, and changes in control.
- 1.2 How many years has Vendor's company been in business? (Minimum of 1 year)
- 1.3 Has Vendor been awarded previous **ITS** RFPs/contracts or participated in other **ITS** EPLs or General RFPs? Please describe.

2. **Financial information.** Provide information substantiating that the Vendor has the financial viability to provide the products/services proposed. Information provided in response to this question will be deemed confidential as provided through **ITS** Open Records policy and procedures. If submitting data as part of a parent company, differentiate the parent company data from data from the responding Vendor's finances. If relying on the financial data of a parent company, supply documentation from the parent company guaranteeing the responding Vendor's performance.

- 2.1 Is the proposing Vendor under federal bankruptcy proceedings? If so, please describe.
- 2.2 Supply a copy of Vendor's most recent financial statement or annual report. (Required)
- 2.3 Vendor may additionally supply some or all of the following as supporting documentation. (Optional)
 - 2.3.1 Dunn and Bradstreet rating with copy of D & B report. Note **ITS** will not pay D & B for these reports.
 - 2.3.2 Business profile or annual report.
 - 2.3.3 Evidence of any other guarantors. Submit supporting documentation.

- 2.3.4 Company's credit level with its major supplier. Submit supporting documentation such as a letter from supplier or banker.
- 2.3.5 Other documentation.

3. **Vendor Services**

ITS is seeking *Value-added Vendors* who can address a customer's needs for delivery, installation, custom integration, training, consulting, and "hand holding" with in-house staff and same or next-day on-site support to the degree required by their Mississippi customers. *Value-added Vendors* have directly invested in staff, training resources, and physical facilities logistically available to Mississippi customers. These are the Vendors who possess established in-house resources to provide integration across a diverse spectrum of technology and a proven track record and expertise with the requested products.

- 3.1 The intent of this section is for Vendor to provide details that substantiate that resources to support the above requirement are **available locally and physically to ITS customers**. Describe Vendor's sales, installation and configuration services in answering the questions below.
- 3.2 Provide the names of current pre-sales team and the location they work out of that will serve Mississippi accounts. Be sure to address how they will handle pre-sales contacts and requests for on-site configuration, including any associated costs. For each, describe if they are full time employees, part time or sub-contractor and their qualifications to assist in sales for the proposed products.
- 3.3 Provide names of pre-sales engineering team and the location they work out of that will serve Mississippi accounts. Be sure to address how they will handle pre-sales contacts and requests for on-site configuration, including any associated costs. For each, describe if they are full time employees, part time or sub-contractor and their qualifications to assist in sales for the proposed products.
- 3.4 Describe the number of staff who are employees of the Vendor, categorized by administration, sales or technical staff. Include:
 - 3.4.1 Do they work full time for Vendor?
 - 3.4.2 What location do they work out of? Is this a physical office location of Vendor's company or are personnel working out of a "virtual office"?
 - 3.4.3 If Vendor relies on out-of-state resources to coordinate with Mississippi staffing, please describe how these resources are utilized.
- 3.5 Describe the number and type of technically certified staff members that will service Mississippi customers.
- 3.6 Provide the names and the location they work out of to service Mississippi accounts. Will the same technicians be used for installation and later for maintenance?
- 3.7 What is Vendor's web site address? Does Vendor have online support or sales information?

- 3.8 Provide specific examples of how Vendor provides **value -added services** for **Mississippi** customers.
- 3.9 The Vendor must discuss all steps involved in distributing this product (from receipt of purchase order to from distribution center to customer). This information **must include** name of manufacturer or distributor from which products are obtained.

Please address the process for the following

- 3.9.1 Handling sales and quotation requests;
- 3.9.2 Tracking the delivery of products (include estimated delivery time and method for correcting shipment errors);
- 3.9.3 Installation;
- 3.9.3.1 Does the Vendor provide installation on equipment proposed?
- 3.9.3.2 If yes, is Vendor installation optional or mandatory?
- 3.9.3.3 What is the recommended installation procedure? (User supplied, Vendor supplied)
- 3.9.3.4 Provide the name and telephone number of the person(s) the state may contact when in need of technical expertise regarding installation problems.
- 3.9.4 Billing;
- 3.9.5 Pricing;
- 3.9.6 Training.
- 3.10 Please provide examples of reports available to summarize Vendor's sales activity. Vendor must be able to provide reports summarizing, at minimum, up-to-date sales activity and individual state entity's purchases.
- 3.11 Please describe any special manufacturer certifications or reseller levels that the Vendor may hold.
- 3.12 Please list any other statewide contracts held by the Vendor.
- 3.13 Will Vendor use any third parties proposed to provide any services indicated in this section? If yes, please list and describe.

4. **Value Added Services**

The Vendor is requested to provide details on those services that he is able to offer over and above this agreement's offerings. These services and characteristics should set the Vendor's company apart from those competing to offer similar services. The Vendor must provide **all**

costs for these services. The Vendor must respond item-by-item to each of the following requirements:

- 4.1 Is Vendor willing to provide any educational seminars or technical briefings? If yes, please describe.
- 4.2 Please describe any attributes of your method of contract management, distribution, and reporting that could be considered a benefit over competitors.
- 4.3 Discuss to what degree Vendor is experienced with the **ITS** customer base.
- 4.4 Please describe Vendor's ability to work with LAN/WAN system integrators on implementation and support for their clients within the **ITS** customer base.
- 4.5 Describe any levels of certification pertinent to servicing the State.
- 4.6 Describe expertise/familiarity experience with the licensing process for the manufacturer proposed. Include information regarding any in-house reps with specializations in proposed manufacturer's products.